Batch Posting in Banner

Uses of Batch Posting within Banner

Financial Aid

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Augusta State University
Agenda

• Overview
• Batch Posting at ASU
• Population Selections
• Documentation
• FAQs
Overview

Batch Posting can help reduce the amount of time spent updating student records. It can be used for several manual processes. We will discuss a few of the ways that we have used them at Augusta State University.
What is Batch Posting

The purpose of batch posting is to allow the user to post the same data to all students who meet a common set of criteria at one time.
Batch Posting in Banner
Financial Aid @ ASU

- Grade Level
- Packaging Date
- Loans
- Grants (ACG and SMART)
- HOPE
- Memo Expiration Date
- C-Flags
Steps to Batch Posting

- There are 4 Steps to Batch Posting. They are…
  - Create the Population Selection: GLRSLCT
  - Extract the data from the Population Selection: GLBDATA
  - Batch Post the Rules: RORPOST
  - Batch Process (the actual update of records): RORBPST
Batch Posting- Example 1

• In June 2007 Financial Aid started to automatic package Stafford Loans. In the past, this process was manual;
• Before the actual loan awards were posted, we had to validate other data.
Data Validation

• The 1st piece of data that we had to validate, was student grade level. This needs to be accurate so when the loan awards are posted, they are posted for the correct amount. (Dependent FR limit = $3500)

• Created a population selection that compares SGASTDN (student record) to RNANA08 (self-reported financial aid record)
Step 1: Population Selection for Grade Level…

APPLICATION: FINAID
SELECTION ID: NEW_FR_GRADE_LEVEL
CREATOR ID: FNALSW

SELECTION DESCRIPTION…
Find FR mismatch grade level

DEFINITION…
SELECT: SARADAP_PIDM
FROM: SARADAP
Grade Level Pop Sel, cont.

- RULES...

- SARADAP_TERM_CODE_ENTRY = & TERM AND
- SARADAP_STYP_CODE= ‘B’ AND
- SARAPPD_APDC_CODE= ‘A’ AND
- RCRAPP1_YR_IN_COLL <> ‘1’ AND
- RCRAPP1_AIDY_CODE= & aid_yr
Step 2: Population Selection Extract

Run GLBDATA (Population Selection Extract)
This will capture the students who meet the criteria that was created in the population selection…
Population Extract (cont)

- Process: GLBDATA
- Printer: DATABASE

- Parameter Values
  - 01 Selection Identifier 1: NEW_FR_GRADE_LEVEL
  - 02 Selection Identifier 2: (BLANK)
  - 03 New Selection Identifier: (BLANK)
• 04 Description for New Selection: (BLANK)
• 05 Union/Intersection/Minus: (BLANK)
• 06 Application Code: FINAID
• 07 Creator Id of Selection ID: FNALSW
• 08 Detail Execution Report: Y

Once all of the parameters have been entered and you save, you will be prompted to enter the Dynamic Parameters…
• Dynamic Parameters
  – SARADAP_TERM_CODE= 200708
  – RCRAPP_AIDY_CODE= 0708

  – Note: These values will not be saved.
Step 3: Batch Posting Rules

RORPOST (Batch Posting Rules)…

This form allows the user to batch post changes, i.e. grade level, packaging date, etc. to the defined population selection.
RORPOST

- Aid Year: 0708
- CREATOR ID: FNALSW
- APPLICATION CODE: FINAID
- SELECTION ID: NEW_FR_GRADE_LEVEL
- USER ID: FNALSW
- TYPE INDICATOR: Y (Banner year in College)
- CODE TO POST: 1 (1st year, no college)
Step 4: Batch Posting Process

• RORBPST (Batch Posting Process)
  – This is the process that actually updates all of the records that were selected in the population selection.
RORBPST

• Printer: DATABASE

• Parameter Values:
  – 01 Aid Year: 0708
  – 02 Print Report (Y/N): Y
• After the process finishes, you should check a few of the students who were updated to make sure that their level is accurate.
Batch Posting- Example 2

– In addition to using the batch posting process for loans, we used batch posting to post the Academic Competitiveness Grant (ACG) and The National Science and Mathematics Access to Retain Talent Grant (SMART).
Set Up

• To identify potentially eligible students for ACG
  – Write a population selection for batch posting (RORPOST) ACG comment codes (U) to user defined fields (RTVUSER/ROAUSDF)
Population Selection for Comment Codes

APPLICATION: FINAID
SELECTION ID: SSA_COMMENT_CODE
CREATOR ID: FNALSW

SELECTION DESCRIPTION…
    Find comment codes for ACG

DEFINITION…
    SELECT: RCVAPPL_PIDM
    FROM: RCVAPPL, RCRESAR
• RULES…

• RCVAPPLI_AIDY_CODE= RCRESAR_AIDEY_CODE AND
• RCVAPPL_CU RR_REC_IND= ‘Y’ AND
• RCVAPPL_CREATE_DATE >= &DATE AND
• RCRESAR_PIDM+ RCVAPPL_PIDM AND
• RCRESAR_SEQ_NO = RCVAPPL_SEQ_NO AND
• RCRESAR_INFC_CODE= RCVAPPL_INFC_CODE AND
• RCRESAR_AIDY_CODE= &AIDY AND
• (RCRESAR_COMM_CODE_01 IN (‘268’, ‘269’, ‘270’, ‘271’) OR
Rigorous HS course | 268
---|---
2 or more AP or IB | 269
ACG possible | 270
## Applicant User Defined

### Applicant User Defined

**Applicant Name:** Ms. Dora Explorer

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Documentation

• Batch Posting
  – Financial Aid User Guide
    • Chapter 2, Processing
    • Chapter 12, Financial Aid Common Functions
    • Chapter 18, Reports & Processes
  – Symposium Workbooks
  – Presentations
    • Summit 2003 and Summit 2006 – North Essex Community College
Documentation

• Population Selection
  – Symposium

• General – User Guide
Current Defects

• As of Financial Aid 7.8
  – None
FAQs

• CMS-3722 – Allow previously packaged students to be re-packaged in batch
• CMS-4262 – Pell origination indicator
• CMS-6373 - Change memo expiration date
• CMS-8998 – Comment codes
More FAQs

• CMS-9718 – Change disbursement schedule date (non-loan funds)
• CMS-11536 – End holds
• CMS-13753 – View awards on Student self-service
• CMS-13837 – Change assigned Pell code